TEN STEPS TO A SUCCESSFUL CONGRESSIONAL LOBBY VISIT

One of the most effective ways to influence a Senator or Representative is lobbying—meeting personally with the Member and/or his staff directly and making your case for a particular policy reform. A lobby visit may be scheduled in the Member's Washington, D.C. office or at one of his/her local offices in the state (for Senators) or District (for Representatives).[1]

This document is designed to help you maximize the impact of your lobby visit, and to follow up on it effectively. The ultimate goal to develop and strengthen your relationship with the Member, so that he/she consistently delivers on your issues.

Before the lobby visit

1. Prepare for the meeting

Successful lobby visits aren't born, they're made—and preparation is the essential ingredient. Indeed, you almost can't overprepare; the more you plan and practice, the better you will execute and the respond to the unexpected during the visit itself.

Your group must have at least one planning session, preferably in person but at least by phone. In the session(s), you should

- *Decide on the policy issues to address during the visit*. ***Don't try to cover more than a couple of policy issues on one visit—you risk losing focus and detracting from impact.*** You are better off scheduling more than one visit than trying to cover too much at once. Make sure every attendee is on board with the focus of the meeting.

- *Assign someone to schedule the meeting.* ***The person responsible for scheduling the meeting must make sure the group will be meeting with the right staff person, if the meeting is not with the Member***. For help in determining whether you have scheduled an appointment with the appropriate Congressional staffer (or need to ask additional staff people to attend the meeting), you may want to consult CSH's handout The Structure of Congressional Offices and/or contact DC-based staff of national organizations like CSH and the National Alliance to End Homelessness.

- *Don't hesitate to call on others for help and information.* You may be able to get useful intelligence on the Member and his/staff from others who have met on similar issues recently—other local non-profits, members of participants' Boards of Directors, etc. National organizations like CSH and the National Alliance to End Homelessness similarly may have useful information to offer. Remember- knowledge is power.

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[1] For more information on the roles and staffing of Washington, D.C. and local Congressional offices, see CSH's handout on The Structure of Congressional Offices. All CSH handouts available from from our website www.csh.org (under the Take Action button) or from Jenice Jones-Kibby at jenice.kibby@csh.org, Buck Bagot at buckb@devinegong.com, or Jonathan Harwitz@jonathan.harwitz@csh.org.

2. Remember that this is *your* meeting— assign and practice different roles beforehand.

You should ***try to stage a dry run/rehearsal before the lobby visit***. The following are roles that the group should consider assigning and practicing (if the group is small, some members may need to fulfill more than one function).

Chair

It is critical that somebody be put in charge of making sure the meeting runs as smoothly as possible. You may wish to consider having the person who is most knowledgeable about the policy issue(s) you will be discussing, or has a pre-existing relationship with the Member's office (if someone does), serve as Chair.

Among the functions of the Chair are to:

- <u>Open the meeting</u>—the Chair should <u>briefly</u> introduce the topic of the meeting (e.g., "We are here to talk to you about the HUD homeless programs."), and provide an opportunity for other participants to introduce themselves. If the group is too large to permit individual introductions, then the Chair should make an agreed upon collective introduction.

- <u>Orchestrate the meeting</u>—the group should consider having the Chair call upon people to make certain points, respond to Member/staff questions, give handouts, tell their stories, etc.

- <u>Maintain pace</u>—the Chair should ensure that the meeting stays on schedule. If he/she is concerned that other duties may distract from this function, the Chair may wish to assign another participant responsibility for moving the meeting in the direction of the specific request of the Member/staffer. (***Helpful Hint for meeting Chairs and their designees***: if more than fifteen minutes has elapsed OR half of the time the Member/staffer has told you he has allotted for the meeting-- whichever is less—and the group has not identified its specific demand, you should move the meeting along.

- <u>Hold the Member/staffer accountable and nail down next steps</u> – the Chair should be responsible for obtaining a response to the group's demand(s) and clarify next steps following the meeting (e.g., will staffer contact Chair with a response, will a follow-up meeting be scheduled, etc.)

Handout Maven

The Chair may choose to handle this role, namely, organizing and handing to the Member/staffer any handouts the group has. (***Helpful Hint**:* Members themselves are much less likely to focus on written handouts than their staff, so consider limiting the number of such documents you distribute in meetings directly with Representatives/Senators-- important handouts can always be sent in follow up communications with staff.)

Note-taker/Scribe

Somebody should be asked to take careful notes of what was said, especially questions raised and commitments made by the Member/staffer. After the lobby visit, the group should ***conduct a debriefing/follow-up meeting*** and these notes will be invaluable.

Questioners and Responders

The group may wish to assign individual participants to ask the Member/staffer specific questions and/or to prepare responses to hard questions you anticipate the Member/staffer raising around your issue(s).

Storytellers

As discussed further in Step 5, the most compelling tactic for making your case for a policy reform is to weave it into real-life stories about the successes of supportive housing. Your group may wish to have some or all of the following stakeholders tell about how supportive housing, and the particular program you are discussing with the Member/staffer, works from the perspective of:

- tenants;
- providers/developers;
- local/state government officials.

In this area, you may find the CSH handout <u>Telling Our Stories Effectively</u> helpful.

<u>During the Lobby Visit</u>

3. Identify yourself and any influential connections you have to the Member.

Namedropping isn't usually considered polite, but it's a virtue on a lobby visit.

Specifically, your group should—especially on an initial visit to a Member-- make him or his staff aware of any personal connections you have collectively or as individual organizations/people. This can help to credentialize your group even before you move on to the substance of the meeting.

Helpful Hint: <u>A good time to do this is during introductions</u>. As individuals introduce themselves and their organizations at the start of the lobby visit, they should be sure to mention friends, relatives, or colleagues (e.g., members of your Boards of Directors) they may have in common with the Member or his staff. Many times the legislative process is facilitated through such informal connections. Also, participants should be sure to mention briefly any other issues on which they may have worked with the Member/staff (and be sure to <u>thank</u> the Member/staff if the office took action on that issue—Members and their staff are people too; they'll be more likely to respond to this request for help if they're praised for past good work).

4. Be specific about what you would like your Member to do.

Know your demands before you walk in the door—if you can't answer the question "what are the concrete actions or actions we want the Member/staffer to take?," then you won't get what you want out of the lobby visit.

Helpful Hint: If you are unsure of the Member's likelihood of supporting your position, you may want to have at your fingertips a range of demands reflecting progressively decreasing levels of commitment—e.g., from introducing or co-sponsoring a piece of legislation, writing a letter to Congressional or Committee leadership, initiating staff-to-staff contact with another important Member on your issue, etc. Plan ahead of time whether, if your group's top-line receives a lukewarm or evasive response, to make a lesser request in the hopes of getting a concrete "yes." This is a matter of judgment—if you think your follow-up to the visit will persuade the target to grant your top-line request, then don't compromise. Conversely, if you think 'starting small' would better help to build the relationship, then consider this alternative.

5. State your views clearly.

Here's a rule of thumb: The more you practice your assigned roles, the simpler your pitch should get.

Always remember to personalize the issue. Include examples from your experiences and the experiences of your community to illustrate your position (that's why your 'Storytellers' are so important—everybody remembers a fact or argument that's embedded in a story better than in isolation). Members of Congress and their staff need to know how issues affect their constituencies. Don't try to overpower them with numbers; give them the human side. Make the Member/staffer say yes or no to people, not abstractions.

6. Consider yourself the expert.

Members and their staff have limited time and resources to spend on any one issue. Remember, you know more about effective housing and homeless assistance programs than they do-- a staffer may not even know what a Continuum of Care or the "SuperNOFA" is. Explaining such concepts—clearly and succinctly—and linking them to your request in the future as you continue to work with the office. Offer to provide them with any information that they may need on homelessness issues.

One day, the Member's office may call you for help—then you know you have established strong, credible relationship.

7. Be honest.

If you don't know the answer to a question, tell them you will find out the answer and get back to them. This can be an opportunity for further contacts and relationship building. There is no shame in getting back in touch, and the most valuable commodity you have in this relationship is your credibility, so never give and stand behind an answer of which you are unsure.

8. Listen.

Don't do all the talking. The Member/staff might have legitimate concerns that you can address. And it is always useful to know as much as possible about their position, whether or not you agree with it. Don't be afraid to ask questions—more information is ALWAYS useful to have.

After the Lobby Visit

9. Follow up:

Be sure to leave your name, address, and phone umber and to ask for the staff person's card. ***Whether or not they agree with you, when you get home, write a letter thanking the Member/staff for meeting with you***. Remind them of what they have agreed to do and ask that she/he write to inform you of the results of that action. Include any information you promised to follow-up with, or indicate when it will be sent.

<u>Remember</u>: Any relationship requires ongoing communication, getting to know someone, and ideally spending some time with him or her. Try to get the Member/staffer to agree to do <u>something</u> – and keep calling them back until they do it, or say that they won't do it. You'll have to be <u>very</u> persistent, especially before you have a relationship. Power will make the staffer more likely to work with you – so organizational letters, grass roots letters, and media coverage and editorial support are all very important. But… always be polite, if firm.

<u>Do</u>: Use positive reinforcement whenever you can. If a staffer really comes through for you, write a letter to the Member praising his/her work.

10. Keep the door open: Even if your Member does not agree with your position, never write her/him off. Consider every meeting or letter an investment in future policy discussions. Add the member/staff to your mailing list and invite them to visit your site. Establish an on-going relationship with your Member and staff.

Some last Helpful Hints:

<u>Don't</u>: be "all business" all the time. Get to know them. Ask how they got into this kind of work, and why. Tell them your story, and learn theirs.
<u>Do</u>: Try to get staff and the Member/Senator them to go on a tour in the home district.
<u>Do</u>: Think about local "grasstops" (e.g., local businesspeople , local government officials) who could lobby the target on your behalf in the future.
<u>Do</u>: Consider other local media outreach and grassroots advocacy approaches. <u>Once again, the more the target sees that you can deliver both positive and negative reinforcement through local advocacy/media activities, the more leverage you will have the next time you contact the office.</u>

Thoughout

11. Have fun – remember, these folks work for YOU. This is your opportunity to make our democracy work.   We hope you enjoy it.